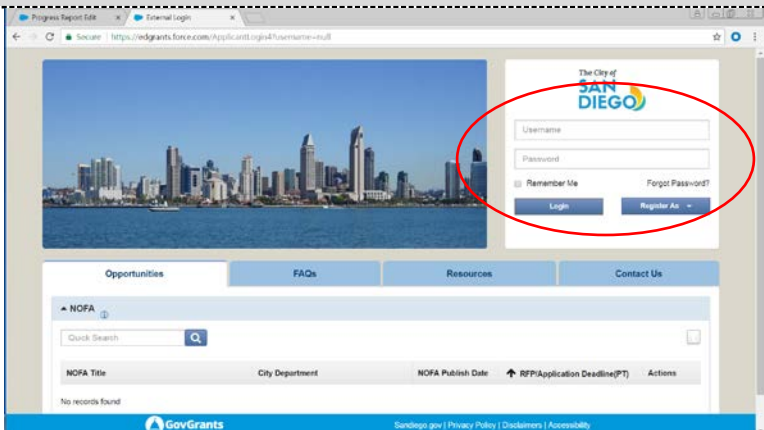
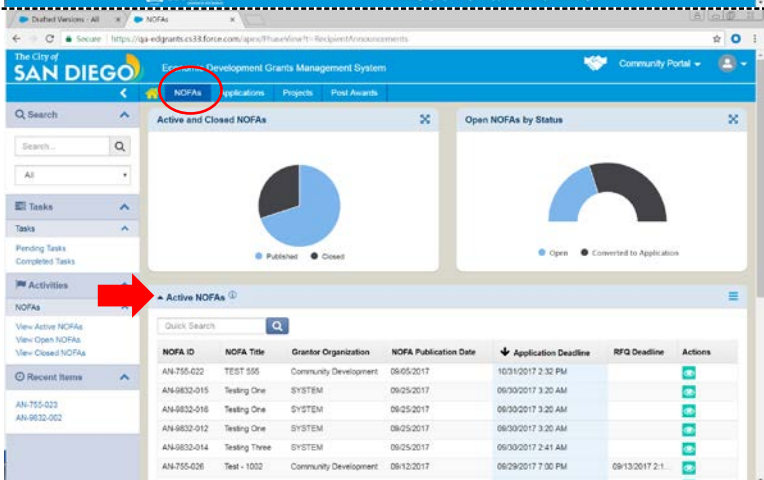




RFQ Response Submission

You will learn:

- How to complete and submit a Request for Qualifications (RFQ) response in ED Grants
- How to open and continue working on a previously saved RFQ response in ED Grants
- How to enter your organization's Board of Directors members in ED Grants after registration

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary R-representative or Secondary Representative of your organization. NOTE: Your organization may need to be registered in ED Grants first to receive log-in credentials. Refer to the 'ED Grants User Registration' guide for assistance.	
2	Go to the 'NOFAs' tab and then scroll down to the 'Active NOFAs' section to view the Notices of Funding Availability (NOFAs) currently accepting Request for Qualifications (RFQ) responses. NOTE: If there are no NOFAs displayed, then that means the City is not accepting responses at the time of your visit.	



RFQ Response Submission

Step	Description	Screenshot
3	Find the NOFA you would like to submit an RFQ response for. Click on the eyeball icon (👁️) in the 'Actions' column to view it.	
4	Verify this is the NOFA you would like to submit an RFQ response for by reviewing the 'General Information' section and locating the 'RFQ Types' field. If you had selected the wrong one, go back to step 2 to begin anew.	
5	Find and click on the 'Open' button to add the NOFA to your organization's 'View Open NOFAs' list.	



RFQ Response Submission

Step	Description	Screenshot
6	Click on the 'View Open NOFAs' link along the left side. Find the specific NOFA you would like to submit an RFQ response for. Click on the eyeball icon (👁️) in the 'Actions' column to open it.	
7	You should now see the NOFA open and two tabs: 'Overview' and 'Financial.' After verifying once again that this is the NOFA you would like to submit a response for, find and click on the 'Create RFQ' button.	
8	The 'Overview' tab should now be open with five sections (i.e., 'General Information,' 'Fiscal/Financial Head,' 'RFQ Contact,' 'Mission Statement,' and 'Organization Profile') with editable fields. Begin populating the fields, using the help text icons (i) for guidance and clarification. After you are finished, click on the 'Save' button. NOTE: You will only see the fields you can edit. Other fields from your 'Organization Profile' (such as organization name, address, board of directors, etc.) will be imported automatically.	



RFQ Response Submission

Step	Description	Screenshot
9	After clicking on the 'Save' button, you should now have access to the 'Experience,' 'Required Forms,' and 'Attachments' tabs. Review the 'Overview' tab and verify your entries. If needed, click the 'Edit' button to reopen the fields to make changes and then click on the 'Save' button. Also, make sure the information on your organization's Board of Directors was imported from the 'Organization Profile' (make updates in the 'Organization Profile' if needed).	
10	Click on the 'Experience' tab. You will need to populate the 'Experience' section and 'Target Population' section. Click on the 'Edit' button first to open those fields. Enter your responses in the narrative fields, using the help text icons provided (i) for guidance and clarification. You are limited to 4,000 characters per section, including spaces. After you are finished, click on the 'Save' button.	
11	Click on the 'Required Forms' tab. You will find four forms to complete: 'Financials,' 'Controls,' 'Procurement,' and 'Certification.' To open and populate each form one at a time, click on the pencil icon (✎) in the 'Actions' column corresponding to each form.	



RFQ Response Submission

Step	Description	Screenshot
12	Fill out each required field, using the help text icons provided (i) for guidance and clarification. You may navigate from form to form using the dropdown menu next to the 'Cancel' button towards the top. Make sure to click on the 'Save' button before navigating away from a form. After saving each form, you will need to click on the 'Edit' button to reopen the fields for changes, if necessary.	
13	Click on the 'Attachments' tab. You will see a list of documents in the 'City Form Description' column which you may need to provide by uploading a PDF of each document to the corresponding item on the list. Check the 'City Form Required?' column or the RFQ Handbook to see if a particular document is either required or optional (i.e., as applicable).	
14	To upload a document for a particular form on the list, click on the pencil icon (✎) in the 'Actions' column corresponding to the form. A popup window with the 'Upload File from Computer' tab and 'Upload File from Workspace' tab should appear. Click on the 'Upload File from Computer' tab.	

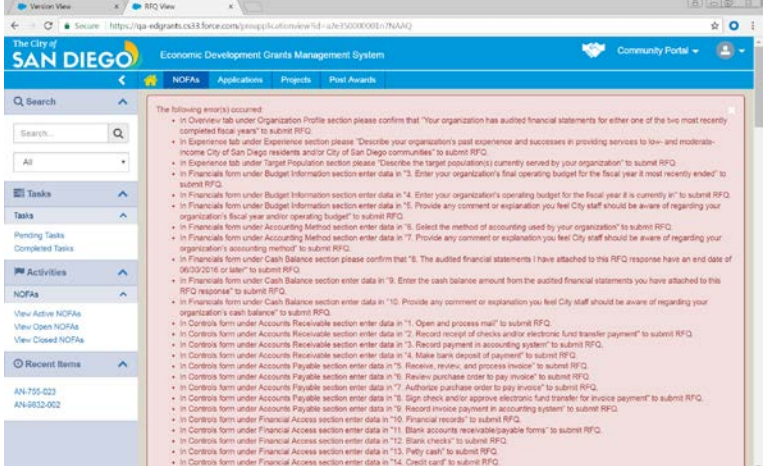


RFQ Response Submission

Step	Description	Screenshot
15	Click on the 'Choose File' button to navigate to the file you would like to upload from your local computer. Click on the 'Open' button to upload the file to the system. NOTE: The system will only accept the following file types: PDF, JPEG, and PNG.	
16	Click on the 'Overview' tab. Enter a required short description of the file in the 'Comments' field. Click on the 'Save' button and then click on the 'X' button to close the popup window. You should now see your comment in the 'Subrecipient Comments' tab and the word 'Link' in the 'Subrecipient Document Link' column. NOTE: Clicking on the word 'Link' brings up the documents uploaded. Refer to the FAQs on RFQ attachments to get guidance on the correct documents to upload.	
17	Click on the 'Submit to Grantor' button to officially submit the RFQ response to the City for review. NOTE: Only your organization's Primary Representative will have access to the 'Submit to Grantor' button. If you are working as the Secondary Representative, coordinate with the Primary Representative to officially submit the RFQ response to the City.	



RFQ Response Submission

Step	Description	Screenshot
18	<p>The system will validate the information you had entered using internal controls. If there are any errors or deficiencies identified, the system will display error messages along the top of the screen. All error messages must be addressed and cleared before the system will allow you to submit the RFQ response.</p>	 <p>The screenshot shows the 'Economic Development Grants Management System' interface. On the left, there's a sidebar with navigation links: Search, Tasks, Pending Tasks, Completed Tasks, Activities, NOFAs, and Recent Items. The main content area displays a list of error messages under the heading 'The following error(s) occurred:'. The errors include: <ul style="list-style-type: none"> Overview tab under Organization Profile section please confirm that "Your organization has audited financial statements for either one of the two most recently completed fiscal years" to submit RFQ. Experience tab under Experience section please "Describe your organization's past experience and successes in providing services to low- and moderate-income City of San Diego residents and/or City of San Diego communities" to submit RFQ. Experience tab under Target Population section please "Describe the target population(s) currently served by your organization" to submit RFQ. Financials form under Budget Information section enter data in "3. Enter your organization's final operating budget for the fiscal year it most recently ended" to submit RFQ. Financials form under Budget Information section enter data in "4. Enter your organization's operating budget for the fiscal year it is currently in" to submit RFQ. Financials form under Budget Information section enter data in "5. Provide any comment or explanation you feel City staff should be aware of regarding your organization's fiscal year and/or operating budget" to submit RFQ. Financials form under Accounting Method section enter data in "6. Select the method of accounting used by your organization" to submit RFQ. Financials form under Accounting Method section enter data in "7. Provide any comment or explanation you feel City staff should be aware of regarding your organization's accounting method" to submit RFQ. Financials form under Cash Balance section please confirm that "8. The audited financial statements I have attached to this RFQ response have an end date of 9/30/2016 or later" to submit RFQ. Financials form under Cash Balance section enter data in "9. Enter the cash balance amount from the audited financial statements you have attached to this RFQ response" to submit RFQ. Financials form under Cash Balance section enter data in "10. Provide any comment or explanation you feel City staff should be aware of regarding your organization's cash balance" to submit RFQ. Controls form under Accounts Receivable section enter data in "1. Open and process mail" to submit RFQ. Controls form under Accounts Receivable section enter data in "2. Record receipt of checks and/or electronic fund transfer payment" to submit RFQ. Controls form under Accounts Receivable section enter data in "3. Record payment in accounting system" to submit RFQ. Controls form under Accounts Receivable section enter data in "4. Make bank deposit of payment" to submit RFQ. Controls form under Accounts Payable section enter data in "5. Receive, review, and process invoice" to submit RFQ. Controls form under Accounts Payable section enter data in "6. Review purchase order to pay invoice" to submit RFQ. Controls form under Accounts Payable section enter data in "7. Authorize purchase order to pay invoice" to submit RFQ. Controls form under Accounts Payable section enter data in "8. Sign check and/or approve electronic fund transfer for invoice payment" to submit RFQ. Controls form under Accounts Payable section enter data in "9. Record invoice payment in accounting system" to submit RFQ. Controls form under Financial Access section enter data in "10. Financial records" to submit RFQ. Controls form under Financial Access section enter data in "11. Bank accounts receivable payable forms" to submit RFQ. Controls form under Financial Access section enter data in "12. Bank checks" to submit RFQ. Controls form under Financial Access section enter data in "13. Petty cash" to submit RFQ. Controls form under Financial Access section enter data in "14. Credit card" to submit RFQ. </p>
19	<p>Once successfully submitted, the RFQ response will be reviewed by City staff, and a determination (either "qualified" or "not qualified") will be made. Only "qualified" organizations will be invited to participate in the subsequent RFP process.</p>	<p style="text-align: center;">End</p>



RFQ Response Submission

How to Open and Continue Working on a Previously Saved RFQ Response:

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization. NOTE: While both the Primary Representative and Secondary Representative are able to work on the RFQ response, only the Primary Representative will be able to officially submit it to the City.	
2	Go to the 'Applications' tab and then click on 'View RFQ Applications' along the left side. Look for the previously saved RFQ response you would like to revise. Click on the corresponding eyeball icon (👁️) in the 'Actions' column to open the RFQ response.	
3	Click on the 'Edit' button to continue working on the RFQ response. Refer to the steps outlined in the 'RFQ Response Submission' guide.	



RFQ Response Submission

How to Enter Your Organization's Board of Directors Members in ED Grants:

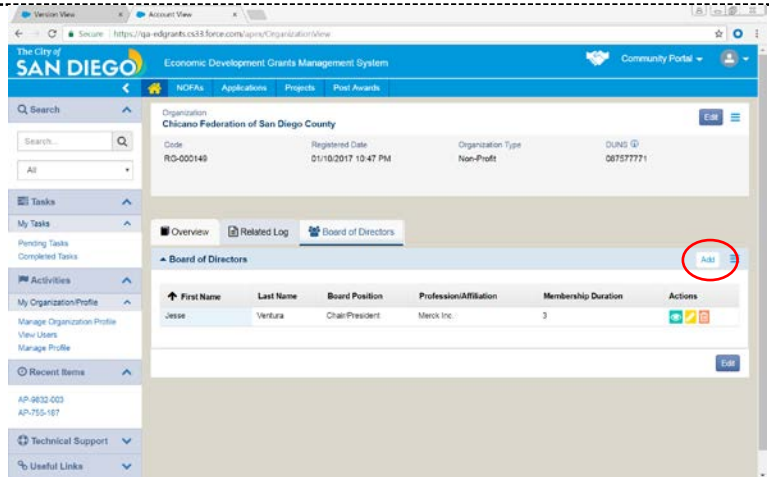
Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization.	
2	Click on the 'Home' tab (🏠) and then click on 'Manage Organization Profile' along the left side.	
3	You should now see three tabs: 'Overview,' 'Related Log,' and 'Board of Directors.' Click on the 'Board of Directors' tab.	



RFQ Response Submission

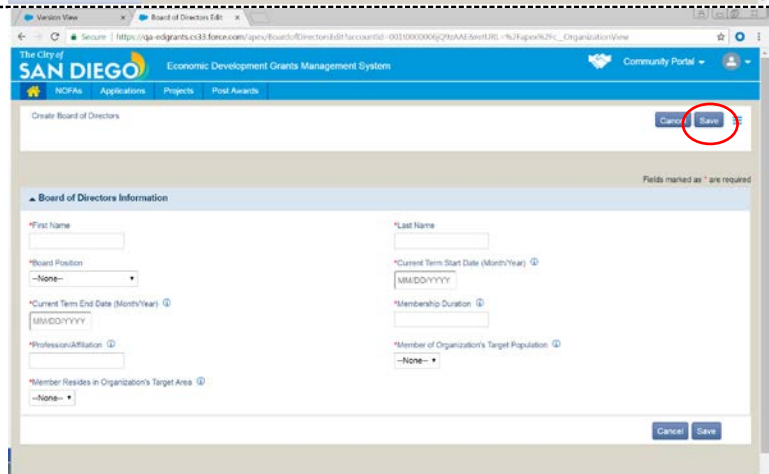
4

Click on the **'Add'** button to open a page where the profile of one board member may be entered.



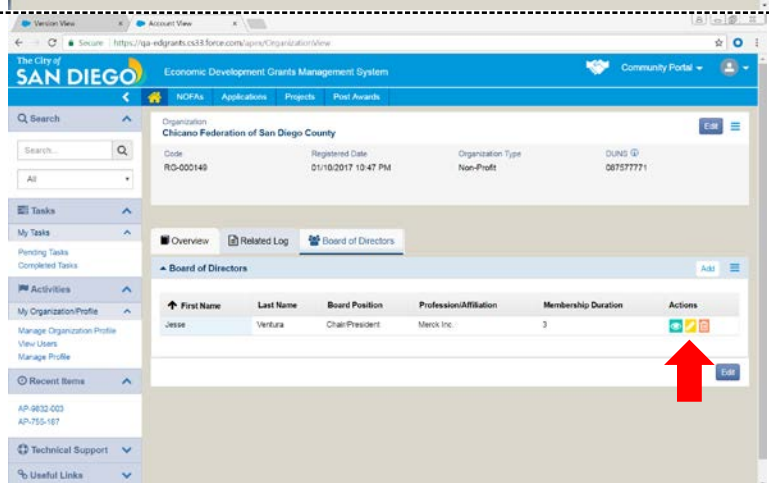
5

Fill out the fields on the page, using the help text icons provided (i) for guidance and clarification. When you are finished, click on the **'Save'** button. Repeat steps 3–5 for each board member until all members have been entered.



6

To edit a board member profile previously entered, click on the **'Board of Directors'** tab and one of the icons in the **'Actions'** column. The trash can icon (🗑️) deletes the entire existing profile from the system. The pencil icon (✎️) opens the profile for editing, after which the **'Save'** button should be clicked to preserve the changes. The eyeball icon (👁️) opens the profile for viewing only.



7

You may update the **'Board of Directors'** tab at any time by following the above steps.

End

For additional support, email CDBG@sandiego.gov or visit the 'Resources' tab at edgrants.force.com.